Creating an NIS Extract Report for Use in MS Excel

The following instructions describe the process for creating a report for export to Excel. This procedure can be used to export any NIS columnar report to Excel.

Navigation

These steps would start as you generate the report job in NIS when you get to the **Printer Selection** screen.

Results

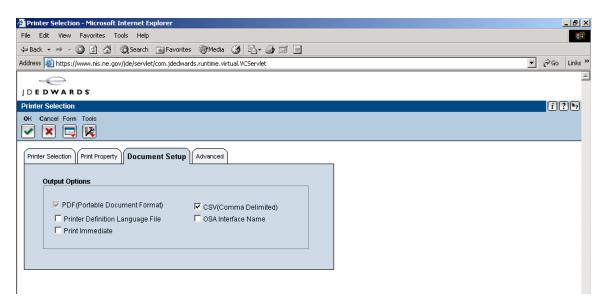
The report can be manipulated using MS Excel.

Process

See following instructions and screenshots.

The initial steps occur in NIS starting with Printer Selection

On the Printer Selection screen select the **Document Setup** tab and click in the **CSV** (Comma Delimited) box

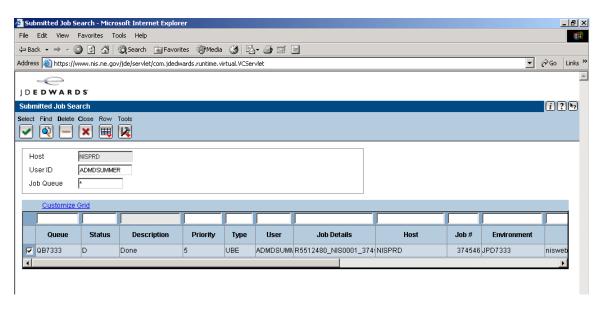


Click OK.

Go to the Submitted Job Search screen

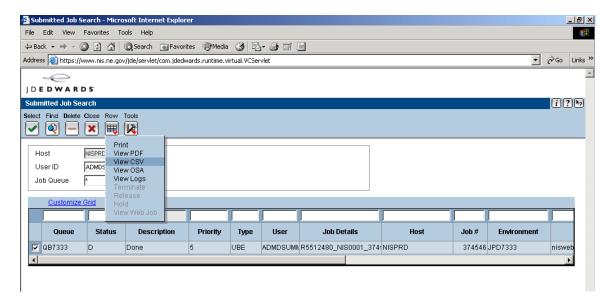
Click Find

Repeat the Find as necessary until the job status changes to **D** (Done)

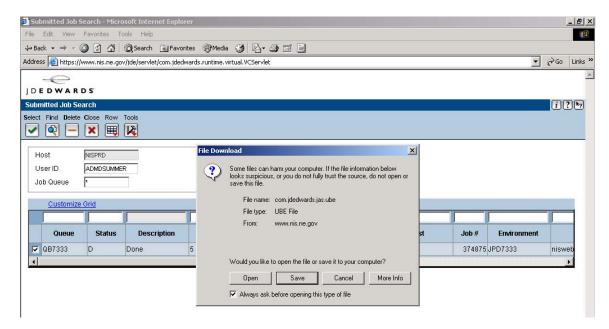


Select the Row containing the desired report by clicking on the box to the left of the row Click on the **Row** Icon

Select View CSV

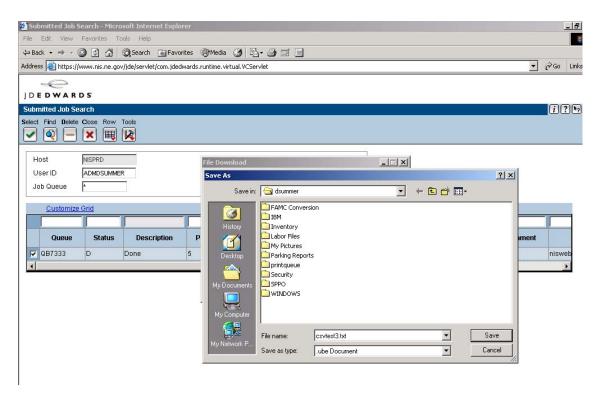


In the File Download popup select Save



In the **Save As** popup select the desired folder in which to save the file and enter a file name with a ".txt" extension

Click Save



The following steps occur after you exit NIS and open MS Excel

Click File

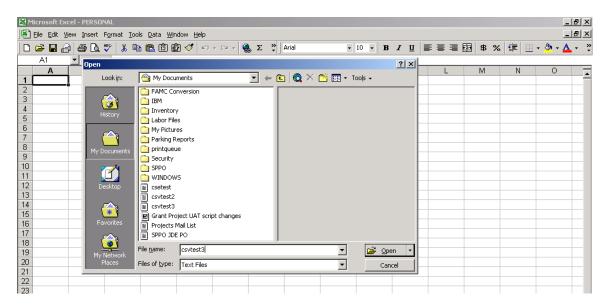
Select Open

Select the desired folder from the Look In dropdown

Select the desired file from the list that appears

Note: The search list may be shortened by clicking the **Files of Type:** dropdown and selecting **Text Files**

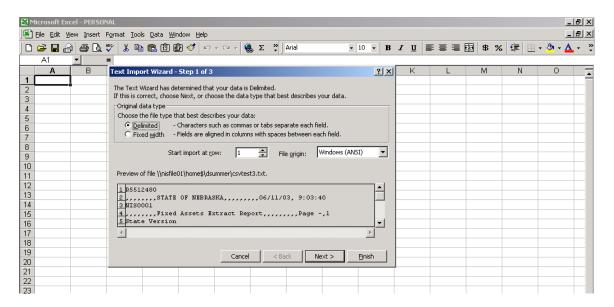
Click Open



Text Import Wizard – Step 1 of 3 should appear

Make sure the radio button next to **Delimited** is selected

Click Next>

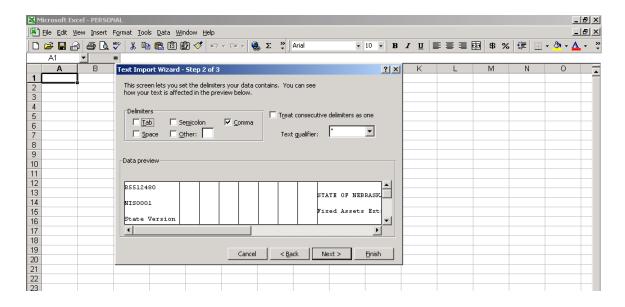


Text Import Wizard – Step 2 of 3 appears

Click on the box next to Comma only

Deselect any other checked boxes in the Delimiters box

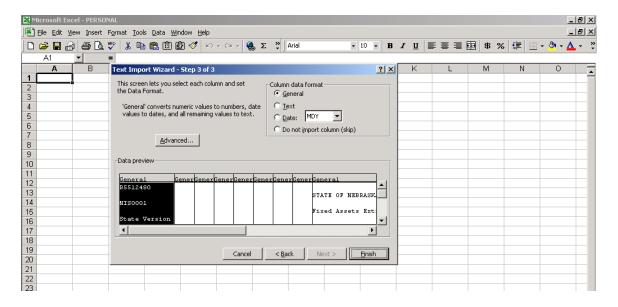
Click Next>



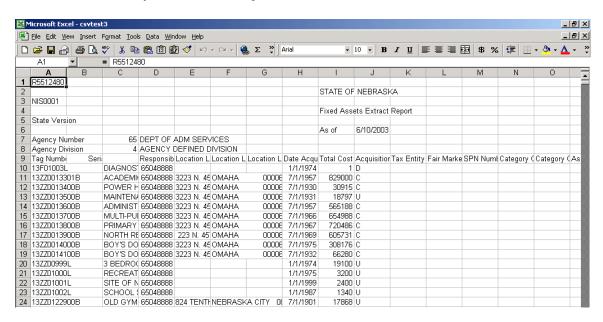
Text Import Wizard – Step 3 of 3 appears

This step allows the user to change data formats for columns or delete unwanted columns. In most cases, no changes need to be made on this screen.

Click Finish



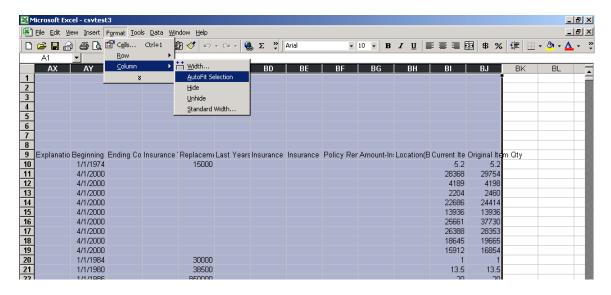
The next screen should show the report data placed in columns on a new worksheet. Data in columns may overrun into adjacent columns because of the default column width.



To improve readability and to determine if data has been properly placed in columns change the column width.

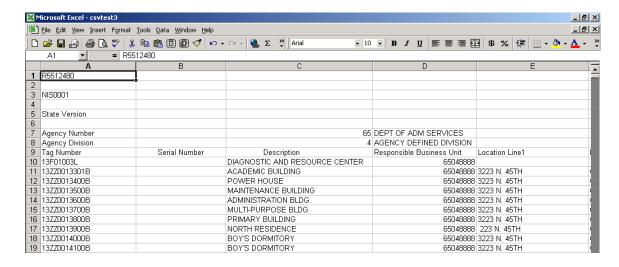
Select the columns containing data by clicking and dragging on the alpha column headings (here AA to BJ). The columns should be highlighted.

Click on Format, Column and Autofit Selection.



The resulting column width will be adjusted to match the widest data field in each column.

The conversion process may create some empty columns which can be deleted and rows of header data which may be deleted or reformatted to improve the appearance of the spreadsheet or allow various Data functions to be performed.



The file may be saved as you would any other MS Excel file.